

- The Principle Investigator and Pre-Award Administrator are the minimum roles required for agencies using workflow
- You cannot use the same PI ID and Pre-Award Administrator, this will cause self-approval of the proposal

Proposal		Projects	Budgets	Resources	Certifications	Reports	Attachments	Schema Attachments
Proposal ID:	BLDG ADD			Version ID:	V101			
Description:	<input type="text" value="Building Addition"/>			Currency:	USD			
Opportunity Number:				Add to My Proposals				
*Title:	<input type="text" value="Building Addition"/>			Description	Start Approval Process			
*PI ID:	<input type="text" value="B000000000"/> Smart,Anthony							
*Sponsor ID:	<input type="text" value="DHHS"/> US Dept of Health & Human Svcs							
Pre-Award Administrator	<input type="text" value="0006655664"/> Smart,Beth O							
Purpose:	<input type="text" value="OTHR"/>							
*Proposal Type:	<input type="text" value="New"/>							
Confidence %:	<input type="text"/>							
				<div style="border: 1px solid #ccc; padding: 5px;"> Status *Proposal Status: <input type="text" value="Draft"/> Submit Status: Not Submitted Generate Status: Not Generated <input type="checkbox"/> In Approval Process </div>				
				<input checked="" type="checkbox"/> Facilities & Admin Requested <input type="checkbox"/> Foreign Application/Component <input type="checkbox"/> Template Proposal <input type="checkbox"/> NIH Modular Grant <input type="checkbox"/> Grants.Gov Proposal				
Due By Budget Express Additional Information CFDA								
*Start Date:	<input type="text" value="03/23/2010"/>		*End Date:	<input type="text" value="03/23/2011"/>		No. Periods:	<input type="text" value="1"/> Build Periods	

- On the Resources tab, you must enter all users involved in the Grants workflow approval process in the Professional section. The PI ID defaults from the Proposal page.
- Also, ensure the Workflow Eligible checkboxes are selected
- If adding one user to multiple roles for the workflow approval process, you must unselect the **Research** checkbox

The screenshot shows the 'Resources' tab with the 'Professional' section highlighted. The table below lists users and their roles, with checkboxes for 'Research' and 'Workflow Eligible'.

Research	Employee ID	Name	*Other Role	Contact PI	Primary PI	Reporting Role	Credit %	Workflow Eligible
<input checked="" type="checkbox"/>	B0000000001	Smart,Anthony	Principal Investigator	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	00023735524	Smart,Jordan P	Grants Manager	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	00024496343	Smart,Judith P	Final Approver	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	00066556643	Smart,Beth O	Pre-Award Adminins	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>

- Once you have entered all required proposal information, go to the **Proposal** page and click the **Start Approval Process** button

The screenshot shows the 'Proposal' page with various fields for proposal information. The 'Start Approval Process' button is highlighted with a red box.

Proposal Information:

- Proposal ID: BLDG ADD
- Description: Building Addition
- Version ID: V101
- Currency: USD
- Opportunity Number: [Empty]

Title: Building Addition

***PI ID:** B000000000 Smart,Anthony

***Sponsor ID:** DHHS US Dept of Health & Human Svcs

Pre-Award Administrator: 0006655664 Smart,Beth O

Purpose: OTHR

***Proposal Type:** New

Confidence %: [Empty]

Status:

- *Proposal Status: Draft
- Submit Status: Not Submitted
- Generate Status: Not Generated
- ☐ In Approval Process
- ☒ Facilities & Admin Requested
- ☐ Foreign Application/Component
- ☐ NIH Modular Grant
- ☐ Grants.Gov Proposal

Buttons: Due By, Budget Express, Additional Information, CFDA, Add to My Proposals, Start Approval Process

Dates: *Start Date: 03/23/2010 *End Date: 03/23/2011

No. Periods: [Empty] Build Periods

- This message will pop-up to ensure you want to begin the workflow approval process; click yes if you are ready to proceed

Are you sure you want to trigger Component Approval Process? (9395,1190)

This will trigger Proposal Component Approval Workflow process.

Yes No

- The **Proposal Status** changes to **Pending Approval** once the approval process is initiated

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Description:	Building Addition	Currency:		USD				
Opportunity Number:	Add to My Proposals							
*Title:	Building Addition	Description		Start Approval Process				
*PI ID:	B000000000	Smart,Anthony						
*Sponsor ID:	DHHS	US Dept of Health & Human Svcs						
Pre-Award Administrator	0006655664	Smart,Beth O						
Purpose:	OTHR							
*Proposal Type:	New							
Confidence %:								
Due By Budget Express Additional Information CFDA		<div> Status </div> <div> *Proposal Status: Pending Approval </div> <div> Submit Status: Not Submitted </div> <div> Generate Status: Not Generated </div> <div> <input checked="" type="checkbox"/> In Approval Process </div> <div> <input checked="" type="checkbox"/> Facilities & Admin Requested </div> <div> <input type="checkbox"/> Foreign Application/Component </div> <div> <input type="checkbox"/> NIH Modular Grant </div> <div> <input type="checkbox"/> Grants.Gov Proposal </div>						
*Start Date:	03/23/2010	*End Date:	03/23/2011	No. Periods:		Build Periods		

- An email notification will then be sent to users listed on the **Resources** tab in the workflow approval process
- Approvers will click the link from the email notification and that will take them into the proposal to review the material
- Once the proposal is reviewed by the user, they will click the **Worklist** link from the main header and approve the proposal
 - Note:** Please refer to “Using a Worklist” Job Aid for questions on the using the Worklist